REQUEST FOR PROPOSAL
IT Service Management Solution

Issued December 28, 2018

Responses due via email

by 4:30pm CT on February 15, 2019

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I.   Introduction

The State Universities Retirement System ("SURS" or the "System") is seeking an ITIL compliant IT Service Management solution. Our desire is to procure a full-suite solution to meet SURS' needs for IT Service Management. This product should assist in advancing towards greater organizational maturity in IT Service Management for SURS through a thoughtful implementation of ITIL best practices. The preference would be for a SaaS or Hybrid solution, but on-premise products will also be considered if the product's functionality would best suit the expressed needs.

All forms/required documents needed for submitting a Request for Proposal ("RFP") are available on the SURS website at www.surs.org.

A proposer's preparation and submittal of a proposal or subsequent participation in presentations or contract negotiations creates no obligation on the System to award a contract or to pay any associated costs. All proposals and related materials will be retained by the System and will be subject to disclosure as required in accordance with the Illinois Freedom of Information Act.

II.   Description of SURS

SURS is the administrator of a cost-sharing, multiple employer, public employee retirement system that provides retirement, survivor, disability and death benefits to employees of Illinois state universities, community colleges, and certain other affiliated organizations and agencies. SURS was created in 1941, by an act of the Illinois General Assembly, and is governed by the Illinois Pension Code (40 ILCS 5/15-101 et seq.). SURS provides benefit services to over 230,000 members who work for 61 employers. SURS is responsible for investing assets of more than $19 billion in a diversified portfolio of U.S. and foreign stocks, bonds, real estate and alternative investments. SURS also administers a defined contribution plan, the Self-Managed Plan, which currently has assets of approximately $2.2 billion. Northern Trust serves as SURS' Master Trustee Custodian.

An elected and appointed, eleven-person, Board of Trustees, governs SURS. The chairperson of the Board of Trustees is, by statute, the chairperson of the Illinois Board of Higher Education. Five members of the Board are appointed by the governor of the state of Illinois. The remaining six members of the Board are elected by participating members (four individuals) and annuitants (two individuals). Our trustees serve six-year terms. SURS is funded by participant payroll deductions and annual employer contributions provided by the state of Illinois. By statute, SURS is defined as a "body politic and corporate" created by Article 15 of the Illinois Pension Code.

SURS currently employs approximately 132 staff, located in 2 offices in Champaign and Naperville, Illinois. Two SURS employees are in the Naperville office. The remaining SURS employees are situated in the Champaign office.

A copy of SURS' most recent Comprehensive Annual Financial Report (CAFR) is available for review, or to download, at www.surs.org.

The Illinois Governmental Ethics Act, 40 ILCS 420, provides guidelines for ethical practices concerning state and local pension plans. Respondent providers should be familiar with the provisions of this Act.

Section 1-109.1(6) of the Illinois Pension Code (40 ILCS 5/1-109.1(6)) encourages Illinois public pension systems like SURS to utilize businesses owned by "minorities", "women", and "persons with disabilities" for all contracts and services, as those terms are defined in the Business Enterprise for Minorities, Women, and Persons with Disabilities Act ("BEMWPD",30 ILCS 575). Additionally, Section 1-109.1(10) of the Illinois Pension Code (40 ILCS 5/1-109.1(10)) sets an aspirational goal of not less than 20% of contracts awarded to such businesses for "information technology services", "accounting services", "insurance brokers", "architectural and engineering services", and "legal services" as defined by the BEMWPD. Accordingly, businesses that meet these definitions are strongly encouraged to submit responses to this RFP.

A section of the Illinois Procurement Code concerning prohibitions of political contributions for vendors, 30 ILCS 500/50-37, may or may not apply to SURS service providers. However, each service provider should be familiar with the provisions of this section and comply with this section if the service provider deems it appropriate.

SURS is subject to its own procurement statutes and rules. Responders should be familiar with those procurement requirements as well. The selected responder will be paid by SURS directly.

Further legal requirements that vendors should be familiar with are contained in the Addendum to Contract under Appendix D.

III.   Services Required

The State Universities Retirement System (SURS) is requesting proposals for an ITIL compliant IT Service Management solution. Our desire is to procure a full-suite solution to meet SURS' needs for IT Service Management. This product should assist in advancing towards greater organizational maturity in IT Service Management for SURS through a thoughtful implementation of ITIL best practices. The preference would be for a SaaS or Hybrid solution, but on-premise products will also be considered if the product's functionality would best suit the expressed needs. ***Refer to Appendix F for a more detailed description of requirements.***

IV.   Minimum Qualifications

- The responder's key professionals and/or organization must not have material conflicts with the SURS Board.
- A minimum of 5 years in business providing IT Service Management Products and Services.

V.   Proposal Content

At a minimum, the proposal must include the following information to be considered for the engagement. For ease of review, each requirement should be addressed separately.

Cover Letter

A cover letter, which will be considered an integral part of the proposal package, in the form of a standard business letter, must be signed by an individual authorized to bind the proposer contractually. This cover letter must indicate the signer is so authorized and must indicate the signer's title or position. An unsigned proposal will be rejected. The cover letter must also include:

a. A statement that the proposal meets all requirements of this RFP, and that the offer tendered by the proposal will remain in full force and effect until and may be accepted by SURS at any time prior to 30 days beyond the deadline for submittal.

b. A disclosure of any current business relationship or any current negotiations for prospective business with SURS, or with any member of the Board of Trustees or SURS staff, or any party currently rendering services to SURS.

c. A statement that the proposer acknowledges that all documents submitted in response to this RFP may be subject to disclosure under the Illinois Freedom of Information Act and/or the Illinois Open Meetings Act.

Statement of Minimum Qualifications

Proposers must complete and return the Minimum Qualifications Certification in the form contained in Appendix A.

Reference Checks

Reference checks will be conducted for each finalist. Please include at least 3 references, public sector experience preferred.

Questionnaire

The questionnaire contained in Appendix B to this RFP must be completed and returned as part of the proposal

Fee Proposal

Proposers must submit a proposal in the format prescribed in Appendix C. Any deviation from the prescribed format which in the opinion of SURS is material and may result in the rejection of the proposal. The proposed fee shall include all costs and expenses for providing the services and equipment as described in this RFP, and any agreed-upon extended warranties that are associated with initial installation. Once finalists are selected, fees may be subject to a "best and final" offer process to be determined at the discretion of the System.

The fee proposal must expressly state that the proposed fees are guaranteed for the term of any resulting contract.

Addendum
Appendix D must be completed and returned as part of the proposal

Services
Please provide responses to service requirements as requested in Appendix F

Product Functional and Technical Evaluation Questionnaire
Please complete and return the Functional and Technical Questionnaire included with this RFP, as requested in Appendix F

Contract
This Request for Proposal is neither a contract nor meant to serve as a contract. It is anticipated that one or more of the proposals submitted in response to this Request for Proposal may be selected as the basis for negotiation of a contract with the proposer. Such a contract is presently contemplated to contain, at a minimum, the terms of the proposal submitted, as finally negotiated and approved by the System. SURS reserves the right to negotiate additions, deletions, or modifications to the terms of proposals submitted. However, the terms contained in Appendix D, Addendum to Contract, must be agreed to and accepted by the candidate or organization selected to perform the work contemplated by this RFP.

Project Schedule
The submission must include a preliminary project schedule based on the number of calendar days required to perform the work following the award of the contract.

VI.   Submission of Proposals

All proposals must be received no later than the deadline stated in the Anticipated Timeline and Contact Information section. Submissions must be made via email to the identified contact person by the stated deadline. ***Only email submissions will be accepted.***

The proposals become the property of SURS upon submission. All costs for developing proposals and attending presentations and/or interviews are entirely the responsibility of the proposer and shall not be chargeable to SURS.

Only one proposal from an individual, firm, partnership, corporation, or combination thereof, will be considered for this assignment.

VII.   Evaluation Process

Pre-Evaluation Review
All proposals will be reviewed to determine if they contain all the required submittals specified in this RFP. Those not submitting all required information in the prescribed format will be rejected.

Proposal Evaluation
All proposals received by the SURS representative on or before the deadline listed above will be reviewed to determine whether they meet the minimum requirements of this RFP.

All proposals received by deadline and pass the pre-evaluation review will undergo an evaluation process conducted by SURS staff. They will be reviewed to determine whether they meet the requirements of this RFP. SURS will consider the following factors in the evaluation process, ranked in no specific order, and will render a

decision based on the perceived best fit and best value for the engagement. Fees will be one of the determining factors in this decision but will not be the primary determinative. Proposals will be evaluated based on criteria including:

- Understanding of the services requested
- Timeline for recommended solution to be implemented
- Proposed methodology and work plan to be used in the process
- Proposed deliverables (products/services)
- Relevant knowledge, experience and qualification of firm and team members including established record of success in similar work
- Commitment to diversity
- Overall Viability (Business Unit, Financial, Strategy, Organization)
- Willingness to negotiate contract terms
- Independence
- Sales Execution
- Warranty
- Cost and overall value proposition
- Ability to scale as needs change
- References, Market Responsiveness, Record
- Customer Experience
- Operations Infrastructure
- Responses to service requirements
- Responses to the Product Functional and Technical Questionnaire
- Adherence to RFP submission requirements

Proposals that contain false or misleading statements or that provide references which do not support an attribute or condition claimed by the proposer will be rejected. Issuance of the Request for Proposal creates no obligation to award a contract or to pay any costs incurred in the preparation of a proposal. Nothing in this RFP or any resulting contract shall preclude SURS from procuring services similar to those described herein from other sources.

During the evaluation process, proposers may be requested to provide additional information and/or clarify contents of their proposal. Other than information requested by SURS, no proposer will be allowed to alter the proposal or add new information after the filing date.

As part of the final determination SURS may want to visit a respondent's Security Operations Center.

Once finalists are selected, fees may be subject to a "best and final" offer process to be determined at the discretion of the System.

Any responder selected by SURS will be subject to the terms of the SURS Travel Policy which are attached hereto as "Appendix E." Vendors should be familiar with these terms as they will be included in any contract awarded by SURS. Responders may either include all expected travel costs as part of their overall "not to exceed" cost for the work to be performed under this RFP or they must provide their best estimate for all travel expenses they expect to incur in performing the services required by this RFP.

VIII.   Anticipated Timeline and Contact Information

Schedule	Dates
Quiet Period Begins	December 28, 2018
RFP Issued	December 28, 2018
Deadline for Responder Questions	January 25, 2019
Response to Questions	January 31, 2019
RFP Responses due 4:30 p.m. CT	**February 15, 2019**
Evaluations and Candidate Interviews	February 18 – February 28, 2019
Anticipated Project Start Date	March 15, 2019

SURS may extend these deadlines at its discretion. Any such extensions will be posted to the SURS website.

SURS RFP Contact Information
Procurement Officer
Procurement_Officer@surs.org
SURS
1901 Fox Drive
Champaign, IL 61825-2710

IX.   Submission Process

Deadline
To be considered for selection, proposals ***must be received via e-mail in Adobe Acrobat format*** at Procurement_Officer@surs.org no later than 4:30 p.m. CT, February 15, 2019. Please reference the "IT Service Management RFP Response - Name of Responder" in your communications. An email confirmation will be sent confirming receipt of the proposal.

Withdrawal
A proposal may be withdrawn any time prior to the deadline by written notification signed by the individual applicant or authorized agent of the firm and received at Procurement_Officer@surs.org no later than the deadline of 4:30 p.m. CT, February 15, 2019. Please   reference the "IT Service Management RFP Response - Name of Responder" in your communications.   An email confirmation will be sent confirming withdrawal of the proposal. The proposal may be resubmitted with any modifications no later than the deadline. Modifications offered in any other manner will not be considered.

Questions
To clarify any issues in this Request for Proposal, SURS will respond only to questions that are presented in writing via e-mail to Procurement_Officer@surs.org. All questions should be submitted to SURS by 4:30 p.m. CT, January 25, 2019. Please reference the "IT Service Management RFP Response - Name of Responder" in your communications.   These questions will be consolidated into a single Q&A document and responded to by

SURS on, or about, January 31, 2019. The Q&A document will be posted on the SURS web site at www.surs.org/rfp without indicating the source of the query.

X.   General Conditions

Freedom of Information Act Disclosure

All materials submitted in response to the RFP become property of SURS. Proposals remain confidential during the selection process. However, upon completion of the selection process, all responses, including that of the individual, vendor or firm selected, will be a matter of public information and will be open to public inspection in accordance with the state of Illinois Freedom of Information Act (FOIA).

If, in response to this RFP, trade secrets or commercial or financial information are furnished under a claim that they are proprietary, privileged or confidential and that disclosure of the trade secrets or commercial or financial information would cause competitive harm to the person or business responding to this RFP, such claim must be clearly made, and such information must be clearly identified. (5 ILCS 140/7 and 7.5) **Responses to this RFP with every page marked as proprietary, privileged or confidential will not satisfy this requirement.** Bidders are required to make a good faith attempt to properly identify only those portions of the response that are truly furnished under a claim that they are proprietary, privileged or confidential and that disclosure of the trade secrets or commercial or financial information would cause competitive harm to the person or business responding to this RFP.

Redacted Version of RFP Response
In the event Responder believes and claims that certain materials or information contained in the submitted response are exempt from public disclosure under the Illinois FOIA, Responder is required to provide a redacted version of the response it believes will be suitable for release under the Illinois Freedom of Information Act. (5 ILCS 140/7 and 7.5)

A RESPONDER'S FAILURE TO PROVIDE A REDACTED VERSION OF THE RFP WILL RESULT IN SURS DISCLOSING THE RESPONDER'S ENTIRE RFP RESPONSE IF THE SAME IS REQUESTED UNDER THE ILLINOIS FOIA AND NEITHER THE RESPONDER NOR ANY THIRD PARTIES SHALL HAVE ANY RECOURSE AGAINST SURS FOR ITS DISCLOSURE OF THE NON-REDACTED RFP RESPONSE.

However, any claim of privilege from disclosure is not definitive. SURS has the right and legal obligation to determine whether such information is exempt from disclosure under the Illinois Freedom of Information Act and no information will be considered or determined by SURS to be proprietary, privileged or confidential unless it is identified and separated as indicated herein.   (5 ILCS 140/7 and 7.5)

Ordinary Course of Business Communications Allowed
Other than existing normal business matters, respondents, potential respondents, or their representatives should not contact anyone at SURS (including SURS staff, members of the SURS advisory committees and members of the SURS Board) other than the listed RFP contact. In addition, respondents must not discuss this RFP with any employee of SURS, trustee of SURS, employee of SURS' custodian, managers, legal counsel, or other advisors or persons/entities having contracts or other affiliations with SURS.

SURS Quiet Period Policy

Please note the following Quiet Period Policy establishing guidelines by which the SURS Board of Trustees and SURS Staff will communicate with prospective vendors or service providers during a search process. **The Quiet Period for this RFP began on the date the RFP was issued: December 28, 2018.**

1. The quiet period shall commence upon Committee action (or Board action if the selection is not initiated through a Committee) to authorize a search for a service provider and end once a selection has been made by the Board and accepted by the service provider;

2. Initiation, continuation and conclusion of the quiet period shall be publicly communicated via the SURS website (www.SURS.org) to prevent inadvertent violations;

3. All Board members, and SURS staff not directly involved in the search process, shall refrain from communicating with potential service providers regarding any product or service related to the search offered by the provider throughout the quiet period and shall refrain from accepting meals, travel, hotel, or other value from the providers;

4. Throughout the quiet period, if any Board member or SURS staff member is contacted by a potential service provider, the Board member or SURS staff member shall refer the provider to the SURS staff member directly involved in the search process;

5. All authority related to the search process shall be exercised solely by the relevant Committee or Board as a whole, and not by individual Board Members;

6. All information related to the search process shall be communicated by SURS staff to the relevant Committee or Board as a whole, and not to individual Board Members;

7. The quiet period does not prevent Board approved due diligence, client conference attendance, or communications with an existing service provider that happens to be a provider in the ordinary course of services provided by such service provider; however, discussions related to the pending selection shall be avoided during those activities;

8. The provisions of this policy will apply to potential service providers throughout the quiet period and shall be communicated to providers in conjunction with any competitive proposal process; and

9. A potential service provider or vendor may be disqualified from a search process for a violation of the Quiet Period or any portion of this policy.

Rights Reserved

SURS reserves the right to amend any segment of the RFP prior to the announcement of a selected vendor/contractor. In such an event, all respondents will be afforded the opportunity to revise their proposals to accommodate the RFP amendment.

SURS reserves the right to remove any or all services from consideration for this contract. At its discretion, SURS may issue a separate contract for any service or groups of services included in this RFP. SURS may negotiate additional provisions to the contract awarded pursuant to this RFP.

SURS may request additional information from any or all bidders to assist in the evaluation of proposals, and SURS reserves the right to conduct background investigations of selected individuals or firms prior to awarding a contract under this RFP.

SURS does not bear any obligation to complete the RFP process or to select any individual(s) or firm(s). SURS also reserves the right without prejudice to reject any or all proposals submitted.

SURS will NOT reimburse any expenses incurred in responding to this RFP.

Equal Opportunity

SURS does not discriminate because of race, color, religion, creed, sex, sexual orientation, age, marital status, military status, certain unfavorable discharges from military service, political affiliation, citizenship, ancestry, national origin, physical or mental handicap or disability or any other characteristic protected by law. It is the System's intent to comply with all state, federal, and local equal employment and opportunity laws and public policies.

Terms and Conditions

Following a review of submitted materials, if requested, selected individuals or organizations must be prepared to make a presentation or otherwise participate in an in-person interview in Champaign, IL or in Chicago, IL with SURS staff members and/or members of the SURS board of trustees at a date and location to be determined by SURS. SURS will not provide reimbursement for any costs incurred by the individuals or organizations associated with this presentation. Prior to the award of a contract pursuant to this RFP, selected individuals or firms must provide all requested documentation.

Appendix A: Statement of Minimum Qualifications

(Firm Name)_____certifies that it meets the following minimum qualifications.

Please initial each as applicable.

1. _____ The responder's key professionals and/or organization has no material conflicts with the SURS Board.
2. _____ A minimum of 5 years in business providing IT Service Management products and services.

Signed:_____Date: _____

Title: _____

Appendix B: Questionnaire

The following questionnaire must be completed and included with your response to this RFP. Type your responses in the same order as the questionnaire, listing the question first followed by your answer.

Contact and Company Information:

Name of Individual / Organization: _____

Mailing Address: _____

City:_____ State: _____ Zip Code:_____ Phone:__
Fax: _____

Federal Employer Identification Number: _____

Contact Person(s):

Name:_____ Phone:_____ Title:_

_____

Fax:_____ Email:_____
Website: _____

Organization Background:

1. Please provide a general description and history of the organization, its operations (please include any history of mergers and/or acquisitions), year founded, ownership structure, biographies of the principals and percentage ownership by current employees.

2. Provide a brief, descriptive statement detailing evidence of the respondent's ability to deliver the goods or services sought under this RFP.

3. Is Respondent a "**Minority owned business**," meaning a business which is at least 51% owned by one or more minority persons, or in the case of a corporation, at least 51% of the stock in which is owned by one or more minority persons; and the management and daily business operations of which are controlled by one or more of the minority individuals who own it? If so, please provide a detailed explanation.

4. Is Respondent a "**Female owned business**," meaning a business which is at least 51% owned by one or more females, or, in the case of a corporation, at least 51% of the stock in which is owned by one or more females; and the management and daily business operations of which are controlled by one or more of the females who own it? If so, please provide a detailed explanation.

5. Is Respondent a "**Business owned by a person with a disability**," meaning a business that is at least 51% owned by one or more persons with a disability and the management and daily business operations of which are

controlled by one or more of the persons with disabilities who own it? A not-for-profit agency for persons with disabilities that is exempt from taxation under Section 501 of the Internal Revenue Code of 1986 is also considered a "business owned by a person with a disability". If so, please provide a detailed explanation.

Appendix C: Fee Proposal

Please include detail regarding scope and cost of services, deliverables and   timeframe for completion of the project.

FIRM NAME:	_____

ADDRESS:	_____

_____

TELEPHONE:	_____

REPRESENTATIVE: _____

1. Provide cost of Services and Products that meet the requirements as noted in Appendix F

2. If applicable, describe any additional ways to differentiate your company from other companies in providing services requested under this RFP, including any additional value-added goods and/or services that can be provided. If practical, the costs associated with any such value-added goods and / or services shall be included in the Proposal as a separate cost. Proponent should also state any opportunities that provide additional immediate or subsequent future savings from efficiencies gained through a proposed value added good or service.

Indicate project duration and frequency of visits below.

_____

_____

_____

_____

Item	Hourly Rate	Cost Not to Exceed Amount
Software Licensing		
Project Management Services		
Implementation Design and Planning Services		
System Implementation Services		
Training		
Support		
Other Consulting/Professional Services		
Cost for additional meetings, if requested by SURS		

Please check and complete one of the following statements as it pertains to travel related expenses:

_____   The above costs DO include all expected travel expenses and said expenses will not be billed separately to SURS.

_____   The above costs DO NOT include all expected travel expenses and said expenses will be billed separately to SURS in compliance with the SURS Travel Policy attached hereto as "Appendix E."

Responder has read the SURS Travel Reimbursement Policy attached hereto as "Appendix E" and estimates that travel expenses to be incurred for work to be performed relative to this RFP per the terms of said policy will total an amount not to exceed: $ _____.

I, _____, an authorized representative of the above-indicated firm, have reviewed and understand the _____ Request for Proposals, and I/we am/are prepared to provide the required services for the above costs.

_____

(SEAL)

ATTACH A MINIMUM OF THREE PROJECT REFERENCES, SIMILAR IN DESIGN AND SCOPE.

ATTACH LIMITS OF COVERAGE FOR PROFESSIONAL LIABILITY INSURANCE.

Appendix D: Addendum to Contract

ADDENDUM TO CONTRACT

In consideration of SURS entering into such contract, the Vendor/Contractor also agrees to the following:

1) If the Contractor is an individual, he or she certifies that he or she is not in default on an educational loan as provided in Section 3 of the Educational Loan Default Act, 5 ILCS 385/3.

2) The Contractor certifies that it is not barred from being awarded a contract or subcontract because of a conviction or admission of guilt for bribery or for bribing an officer or employee of the State of Illinois or any other state in that officer or employee's official capacity as provided in Section 50-5 of the Illinois Procurement Code, 30 ILCS 500/50-5.

3) The Contractor certifies that it will provide a drug free workplace by engaging in the conduct prescribed in Section 3 of the Drug Free Workplace Act, 30 ILCS 580/3.

4) The Contractor certifies that it is not barred from contracting with SURS because of a violation of either Section 33E-3 (bid-rigging) or 33E-4 (bid rotating) of Article 33E of the Criminal Code of 1961, 720 ILCS 5/33E.

5) The Contractor certifies that neither it nor any substantially owned affiliated company is participating or shall participate in an international boycott in violation of the provisions of the

   U.S. Export Administration Act of 1979 or the regulations of the U.S. Department of Commerce promulgated under that Act.

6) The Contractor certifies that no fees, commissions, or payments of any type have been or will be paid to any third party in connection with the contract to which this is an addendum, except as disclosed in the contract or an exhibit thereto as provided in 30 ILCS 500/50-25 and in 40 ILCS 5/1-

   145. The Contractor shall promptly notify SURS if it ever has reason to believe that this certification is no longer accurate.

7) To the extent Illinois law is applicable to Contractor, pursuant to 775 ILCS 5/2-105, Contractor agrees to:

   a) Refrain from unlawful discrimination and discrimination based on citizenship status in employment and undertake affirmative action to assure equality of employment opportunity and eliminate the effects of past discrimination;

   b) Comply with the procedures and requirements of the Illinois Department of Human Rights' regulations concerning equal employment opportunities and affirmative action;

   c) Provide such information, with respect to its employees and applications for employment, and assistance as the Illinois Department of Human Rights may reasonably request; and

   d) Have written sexual harassment policies that shall include, at a minimum, the following information:

      i) The illegality of sexual harassment;

      ii) The definition of sexual harassment under State law;

  iii) A description of sexual harassment, utilizing examples;

   iv) Contractor's internal complaint process including penalties;

   v) The legal recourse, investigative and complaint process available through the Illinois Department of Human Rights and the Illinois Human Rights Commission;

   vi) Directions on how to contact the Illinois Department of Human Rights and the Illinois Human Rights Commission; and

   vii) Protection against retaliation as provided by Section 6-101 of the Illinois Human Rights Act. A copy of the policies shall be provided to the Illinois Department of Human Rights upon request.

8) To the extent it applies to Contractor and this contract, Contractor agrees to comply with the Illinois Prevailing Wage Act, 820 ILCS 130/1, *et seq*.

9) Contractor shall maintain, for a minimum of five (5) years after the completion of the contract, adequate books, records, and supporting documents to verify the amounts, recipients, and uses of all disbursements of funds passing in conjunction with the contract. Contractor shall further make all such books, records, and supporting documents related to the contract available for review and audit by the internal auditor of SURS and by the Illinois Auditor General and shall cooperate fully with any audit conducted by the internal auditor of SURS and the Illinois Auditor General and will further provide the internal auditor of SURS and the Illinois Auditor General full access to all relevant materials.

10) Contractor agrees to notify the SURS Ethics Officer if it solicits or intends to solicit for employment any of the employees of SURS during the term of the contract.

11) Contractor understands that SURS and this contract are subject to the provisions of the Illinois Open Meetings Act (5 ILCS 120/1, *et seq*) and the Illinois Freedom of Information Act (5 ILCS 140/1, *et seq*).

12) Counterparts. This Agreement and Addendum may be executed in counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute one and the same agreement. The counterparts of this Agreement and Addendum may be executed and delivered by facsimile or other electronic signature by any of the parties to any other party and the receiving party may rely on the receipt of such document so executed and delivered by facsimile or other electronic means as if the original had been received.

Under penalties of perjury, Contractor certifies that _____ is its correct Federal Taxpayer Identification Number.

Contractor is doing business as a(n) (please circle applicable entity):

- Individual
- Corporation

- Sole Proprietorship
- Not-for-Profit Corporation

- Partnership
- Medical and Health Care Services Provider Corporation

- Real Estate Agent

- Governmental Entity

- Tax Exempt Organization (IRC 501(a) only)

- Trust or Estate

- Other: _____

Appendix E: SURS' Travel Policy

SURS TRAVEL REIMBURSEMENT POLICY TERMS FOR APPROVED TRAVEL EXPENSES OF VENDORS

If Responder's personnel are required to travel to perform work on behalf of SURS, any reimbursement for said travel expenses will be as allowed, in part, by the travel requirements outlined by the Illinois Higher Education Control Board as found in Title 80, Public Officials and Employees, Chapter 4, Travel Regulation Counsel, Part 3000, Illinois Administrative Code as noted below. Accordingly, any expected travel must be pre-approved by SURS and said travel reimbursements will be restricted to the following:

NOTE: actual cost receipts for the same must be provided before SURS may reimburse travel expenses.

Travel by Air. SURS will reimburse travel expenses for airfare at the price of a standard coach ticket. All travel must be via the most direct route. Expenses incurred due to deviations for convenience shall be borne by the traveler. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Travel by Rail. SURS will reimburse travel expenses for train travel at the price of a standard coach ticket. All travel must be via the most direct route. Expenses incurred due to deviations for convenience shall be borne by the traveler. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Travel by Automobile.

    i.   Rental Cars

        SURS will reimburse travel expenses for the use of a rental car at the rate of $60.00 per day. The collision damage waiver and personal accident insurance on rented vehicles are not reimbursable. All travel must be via the most direct route. Expenses incurred due to deviations for convenience shall be borne by the traveler. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative   of SURS.

    ii.   Private Vehicles - Mileage Reimbursement

        If an individual chooses to drive a private vehicle, reimbursement for use of a vehicle shall be on a mileage basis and shall be at the applicable rate identified by the Illinois Higher Education Travel Control Board which is based on the rate promulgated pursuant to 5 USC 5707(b)(2) in effect at the time of travel. All travel must be via the most direct route. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy.

Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Hotel Accommodations. SURS will reimburse hotel expenses at a maximum rate of $150.00 per day. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Per Diem for Meals. SURS will pay a maximum of $45.00 per day for a full day of *per diem* meal reimbursements with limits of $10.00 for breakfast; $10.00 for lunch and $25.00 for dinner. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Appendix F: Requirements

1.1. Current State, Goals and Scope

The State Universities Retirement System (SURS) is seeking an ITIL compliant IT Service Management solution. Our desire is to procure a full-suite solution to meet SURS' needs for IT Service Management. This product should assist in advancing towards greater organizational maturity in IT Service Management for SURS through a thoughtful implementation of ITIL best practices. The preference would be for a SaaS or Hybrid solution, but on-premise products will also be considered if the product's functionality would best suit the expressed needs.

1.1.1. INFORMATION TECHNOLOGY OVERVIEW
Technology at SURS is divided into two primary areas: Application Development and Infrastructure/Operations.

1.1.2. CURRENT STATE
SURS is currently using Zoho's ManageEngine Service Desk Plus, Desktop Central and ADAudit Plus. Currently all incidents and requests are handled through Service Desk Plus. SLAs are not being utilized and helpdesk requests are submitted only via email. No user portal is being utilized. Application Development change requests are handled in a separate in-house developed application. WiseTrack is used for Asset Management.

1.1.3. GOALS AND OBJECTIVES TO BE ACHIEVED
- Provide a single-pane of glass view into all project, facilities, incident, change and knowledge management activities throughout the IT organization.
- Implement new ITIL-compliant processes, tools and best practices.
- Implement a solution that will allow for configurable workflows with managed SLAs.
- Provide a tool to manage changes in order to reduce the number of incidents and unplanned changes.
- Provide seamless integration across ITSM processes and key existing data sources.
- Implement a tool that supports entire organization in IT process maturation as it relates to the ITIL framework.

1.1.4. PRODUCT SCOPE
The product provided by the vendor should include at a minimum the following:

MANDATORY:

- Incident Management (SLA Management, Reporting Dashboards, Workflows for handling/approval)
- Problem Management
- Change Management (CAB Dashboard, Approval Workflow, Denial Handling, Calendar of Change events, notifications)
- Project Management (Status Dashboards, project initiation/approval workflow, resource tracking, financial tracking)
- Reporting (automatic conditional emails, critical alerts, dashboards)
- Surveying (CSATs, Ad Hoc)
- Online (paperless) collaboration and workflow

OTHER DESIRED:

- Self-Service Portal/Catalog
- Knowledge Management (knowledge lifecycle workflow, expiration of content)
- Problem Management (CI tracking, reporting, notifications)
- Extensible APIs for integrations (for example, Solarwinds, O365, AD, ManageEngine, WiseTrack, barcode scanning, SIEM solutions)
- Mobile Portal (either app or HTML5 adaptive website)
- Facilities Mgmt. (Building issues, support services requests)
- Contract Mgmt. (Vendor dashboards, contract lifecycle, workflow)
- Asset Mgmt. (single pane of glass for all items)
- IT Financials (track budgets, costs)

WON'T IMPLEMENT AT THIS TIME:

- GRC (Governance-Risk-Compliance, Audit Tracking)
- Self-Healing/Automation (auto-ticketing and resolution based on machine-based learning)

1.2. Services Required

The Vendor will be required to provide a variety of services as part of implementing the ITSM solution. The services provided will vary depending on the nature of the ITSM Toolset solution proposed by the Vendor. ***Please provide responses with your RFP submission, as noted in each section.*** Services are to include the following, dependent upon solution provided:

1.2.1. PROJECT MANAGEMENT (CORE REQUIREMENT)
- Vendor is to provide a Project Manager.
- The Project Manager is to serve as single point of contact and coordinate all tasks with the SURS Project Manager.
- Vendor Project Manager is to develop project schedule and plans.
- Vendor Project Manager is to provide quality assurance and oversight for all vendor services.
- Vendor Project Manager is to identify and schedule Vendor resources to meet project deliverables and timelines.
- Vendor Project Manager is to provide a detailed implementation plan.
- Vendor Project Manager is to provide status reports including, but not limited to, work completed, work underway, upcoming planned work, scheduled changes and delays.

1.2.1.1	Provide a brief description about your company's ability to provide all the services listed above in section 1.2.1. If unable to provide any of the services, indicate what you are not able to provide or where your services deviate from what is listed.
	Include response with RFP proposal

1.2.2. ITSM IMPLEMENTATION DESIGN AND PLANNING (CORE REQUIREMENT)
- Detailed design documents and diagrams for all components of the proposed system, whether On Premises or SaaS.
- For On-Premises systems, server hardware recommendations for initial planned implementations and expanded implementations.
- Storage hardware recommendations for initial planned implementations and expanded implementations.
- Recommendation on best approach for process implementation, and definition of implementation phases, if phases are applicable.

- Recommendation on SURS personnel required to support the system.
- Recommended conversion and migration approach (e.g., from various currently implemented solutions to proposed solution).
- Recommended test plans and procedures.
- Standard Operating Procedures conducive to an institution of our size.
- Recommended best business practices for use of the ITSM solution.
- Product documentation.

1.2.2.1	Provide a brief description about your company's ability to provide all the services listed above in section 1.2.2. If unable to provide any of the services, indicate what you are not able to provide or where your services deviate from what is listed.
	Include response with RFP proposal

1.2.3. ITSM SYSTEM IMPLEMENTATION SERVICES (CORE REQUIREMENT)
- For On-Premise systems, supply and install the application software on hardware provided by SURS.
- Complete system implementation.
- Setup and configuration of all integrations fully supported in the current release of the product including, but not limited to Active Directory and single sign-on.
- Provide support staff during configuration acceptance tests.
- Selected vendor will be subject to SURS' travel policy as noted in Appendix E.

1.2.3.1	Provide a brief description about your company's ability to provide all the services listed above in section 1.2.3. If unable to provide all of the services, indicate what you are not able to provide or where your services deviate from what is listed.
	Include response with RFP proposal

1.2.4. TRAINING (CORE REQUIREMENT)
- The selected Vendor shall provide all technical, operational, and administrative knowledge transfers required for SURS personnel to successfully conduct activities related to the deployed solution.
- Technical training materials and classes including both onsite and distance/online delivery.
- End user training materials and classes including both onsite and distance/online delivery.
- Selected vendor will be subject to SURS' travel policy as noted in Appendix E.

1.2.4.1	Provide a brief description about your company's ability to provide all the services listed above in section 1.2.4. If unable to provide all of the services, indicate what you are not able to provide or where your services deviate from what is listed.
	Include response with RFP proposal

1.2.5. SUPPORT (CORE REQUIREMENT)
- Ongoing application maintenance and support.
- Warranty support for all system software.
- A detailed Service Level Agreement (SLA) as agreed upon by both SURS and the selected vendor.

1.2.5.1	Provide a brief description about your company's ability to provide all the services listed above in section 1.2.5. If unable to provide all of the services, indicate what you are not able to provide or where your services deviate from what is listed.
	Include response with RFP proposal

1.2.6. CONSULTING/PROFESSIONAL SERVICES (OPTIONAL)
- Technical consulting and development of system integrations.
- Documentation of custom development and integrations.
- Data conversion and migration (e.g., from various currently implemented solutions to proposed solution).
- Technical consulting services on integrations with external systems (e.g., web services, external workflow, etc.).
- Process design and improvement.

1.2.6.1	Provide a brief description about your company's ability provide all the services listed above in section 1.2.6. If unable to provide all of the services, indicate what you are not able to provide or where your services deviate from what is listed.
	Include response with RFP proposal

1.3. Product Functional and Technical Evaluation

Vendor <u>must</u> complete and return the <u>Functional and Technical Evaluation Questionnaire</u>, indicating how the proposed solution will comply with the stated functional or technical specifications. Provide a capability rating (0-4) and provide responses to the questions as they relate to the **CURRENT** release of the product. If this functionality is planned for a future release, include the expected date for each question. ***This is a key component of Vendor proposal evaluation.***

Vendor Instructions

Vendors should complete the following capabilities questionnaire by indicating the level to which the stated criteria is supported, based on the five possible answers below.

Rating	Definition
0	**Functionality not provided.** The software does not meet the requirements. If the required functionality is planned for a future release, please indicate the timescale (month and year) in the Comments column.
1	**Functionality provided; requires customized integration with third-party solution.** The vendor has established a relationship with a business partner to provide this functionality, but it needs customizing or working around in order to be deployed as an integrated solution. Identify any areas where modification will impact the application upgrade path.
2	**Functionality provided by the vendor, but requires customization or PaaS extension.** The functionality can be accomplished with the vendor's products, but some customizing or working around is required. For ERP applications delivered as cloud services (which therefore cannot be customized), the functionality would be provided by building an extension using platform as a service (PaaS) capabilities provided either by the vendor or a third party. Identify any areas where customization, modification or extension will affect the application upgrade path.
3	**Functionality provided by seamless integration with third-party solution.** The vendor has established a relationship (e.g., as an OEM) with a business partner to provide this functionality, which is fully integrated (in terms of data, process and application) with the proposed solution and requires no customization or integration development. Give the name of the recommended application.
4	**Functionality provided as standard.** The software fully supports the requirements, and the vendor provides the functionality from its own codebase. No customization or work-around is required. Some configuration may be required, but this should not be significant or complex, should not add significantly to the implementation timescales, and should not affect future upgrades.

The Comments column is provided for clarification, when necessary.

By answering a question affirmatively, the vendor agrees to support such capabilities within the product.

Functional and Technical Evaluation

Area		Question	Capability (0-4)	Comments
Product Functionality				
1	Availability Management	Describe your product's ability to facilitate Availability Management.		
2	Capacity Management	Describe your product's ability to facilitate Capacity Management.		
3	Change Management	CAB Dashboard, Approval Workflow (QA/Testing confirmation & audit trail), Denial Handling, Calendar of Change events, notifications.		
4	Change Management	Describe your product's ability to facilitate Change Management.		
5	Change Management	How does your Change Management process area support workflows?		
6	Change Management	How would your Change Management process area support multiple and distinct groups of approvers possibly following multiple change processing paths?		
7	Change Management	How does your product facilitate emergency changes?		
8	Change Management	Tell us how your product identifies duplicate Requests for Change (RFC).		
9	Change Management	How does your product allow for defining dependencies between change requests?		
10	Change Management	Describe your product's ability to send change notifications to staff outside the change process.		
11	Contract Management	Describe how your product facilitates Contract Management, including Vendor Dashboards, contract lifecycle		
12	Event Management	Describe your product's ability to facilitate Event Management.		
13	Facilities Management	Describe if/how your product is adaptable to manage building issues, support services requests.		
14	Financial Management	Describe how your product provides a single pane of glass for asset management		
15	Financial Management	Describe your product's ability to facilitate Financial Management.		
16	Financial Management	Describe how your product facilitates Vendor Management.		

	Area	Question	Capability (0-4)	Comments
17	Financial Management	Describe how your product integrates with third-party vendor product catalogs, such as Dell, Apple, CDWG, etc.		
18	Financial Management	Describe your product's ability to track and manage purchases.		
19	Financial Management	Describe your product's integration between Financial and Asset Management.		
20	Financial Management	Describe how your product captures costs and tracks to budget		
21	General	What process areas support prioritization within your product?		
22	General	Which fields within your product support rich text editing and can images/screenshots be inserted inline in text boxes?		
23	General	Does your product support the ability to add attachments? Which processes support this feature?		
24	General	Describe your product's reporting capabilities and how users are able to create ad-hoc reports. Also indicate if automatic, conditional emails and critical alerts are part of the reporting mechanism.		
25	General	Describe how your product supports role-based access as it applies to reporting.		
26	General	Describe how your product supports report scheduling and automation.		
27	General	Describe your product' s dashboard capabilities and if users can customize? If so, describe.		
28	General	Include a screenshot of two sample dashboards. One should include a stock dashboard that comes with the product and the second should be a customized dashboard.		
29	General	Describe the workflow capabilities of your product, and how they are created.		
30	General	What chat functionality does your product offer (for end user and internal support) and is chat communication captured? If so, please describe.		
31	General	What capabilities does your product have to send communications to any user or group and have the message and response tracked in the product?		
32	General	Describe your product's ability to customize forms and templates and for which ITIL processes they are available.		

	Area	Question	Capability (0-4)	Comments
33	General	Do you have an integrated ITIL and ITSM process modeling technology available? If so, describe.		
34	General	Discuss the alignment of Vendor's product plans with the direction of the industry, providing information detailing the Vendor's intent to comply with industry standards.		
35	General	Is your product certified for ITIL compliance by Pink Elephant and/or another certification agency? If so, list processes certified and by which agency.		
36	General	Describe how your product supports online (paperless) collaboration and workflow		
37	General	What provisions does your product have for GRC (Gevernance-Risk-Compliance), Audit Tracking		
38	Incident and Problem Mgmt	How does your product offer ticket prioritization based on impact / urgency matrix?		
39	Incident and Problem Mgmt	Can the priority matrix be configured for different units / support groups? If so, describe.		
40	Incident and Problem Mgmt	How does your solution offer integration for remote control support?		
41	Incident and Problem Mgmt	Describe your product's ability to link and/or merge tickets.		
42	Incident and Problem Mgmt	How is Knowledge Management integrated with Incident Management in your tool?		
43	Incident and Problem Mgmt	Describe your product's ability to conduct user surveys. Ad-hoc, CSAT's. How are they customizable?		
44	Incident and Problem Mgmt	Describe your product's ability to facilitate Incident and Problem Management, including how your product handles individual tasks within Incident Management and Request Fulfillment.		
45	Incident and Problem Mgmt	CI tracking, reporting, notifications		
46	Incident and Problem Mgmt	SLA Mgmt, Reporting Dashboards, Workflows for handling/approval		
47	Knowledge Management	Knowledge lifecycle workflow, expiration of content		
48	Knowledge Management	Describe your product's Knowledge Management Solution.		
49	Knowledge Management	How does your product support multiple knowledge bases (i.e. both internal and public facing)?		
50	Knowledge Management	Describe how your product utilizes roles and permissions in Knowledge Management.		
51	Knowledge Management	How does your Knowledge Management support versioning in areas such as Knowledge Base articles, etc.?		

	Area	Question	Capability (0-4)	Comments
52	Knowledge Management	Describe your product's ability to facilitate a full Service Knowledge Management System (SKMS) as defined by ITIL and a list of the areas supported by your product's SKMS.		
53	Knowledge Management	Describe how the SKMS within your product supports process areas and functions within the software. Examples include Capacity Management, Availability Management, Configuration Management, etc.		
54	Knowledge Management	How quickly do knowledge articles become available for searching (indexed) after being entered into the Knowledge Management system?		
55	Knowledge Management	Describe how your product supports the Knowledge Centered Support (KCS) methodology.		
56	Mobile Portal	Does your product include a mobile portal - HTML5 adaptive or app? If so, please describe.		
57	Project Management	Describe your product's Project and Portfolio Management capabilities, i.e. Status Dashboards, project initiation/approval workflow, resource tracking, financial tracking		
58	Release Management	Describe the relationship between Change Management and Release Management within the product.		
59	Release Management	Describe your product's ability to facilitate Release Management.		
60	Request Fulfillment	How does your product support triggering a service request based on a calendar?		
61	Request Fulfillment	Describe how your product's self-service portal provides a 'shopping cart' approach to ordering services and equipment.		
62	Request Fulfillment	Describe your product's ability to facilitate Request Fulfillment.		
63	Self-Healing/Automation	Does your product feature auto-ticketing and resolution based on machine-based learning?		
64	Service and Support	Describe the training programs and tools available for your product.		
65	Service Asset and Configuration Management	Describe your Configuration Management Database (CMDB) in detail and what ITIL processes it supports.		
66	Service Asset and Configuration Management	Describe your product's ability to track and display relationships between configuration items.		

	Area	Question	Capability (0-4)	Comments
67	Service Asset and Configuration Management	Describe how your product facilitates Asset Management including its ability to update configuration items based on changes.		
68	Service Asset and Configuration Management	Describe how your Asset and Configuration Management components tie in with your Incident and Problem Management components, as well as the ability to report on historical issues.		
69	Service Asset and Configuration Management	How does your product support the ability to track purchase dates, warranties, lifecycles and other factors for purposes of forecasting and the ability to report on this data?		
70	Service Asset and Configuration Management	Describe your product's ability to support barcode readers and how it can relate to incident and configuration items.		
71	Service Asset and Configuration Management	Describe your product's ability to auto discover assets (both using an agent and agentless).		
72	Service Asset and Configuration Management	Describe your licensing model and how your product tracks software licensing?		
73	Service Asset and Configuration Management	Describe your product's ability to facilitate Service Asset and Configuration Management.		
74	Service Catalog Management	Describe the Service Catalog features of your product, and how the catalog is Managed. Is there a self-service portal?		
75	Service Catalog Management	Describe your product's ability to facilitate Service Level Management.		
Technical and Integration				
76	Data	Describe your product's database technology platform, data structure and ability to add custom fields		
77	Data	Describe how SURS will be able to directly access the raw data contained in the product's database(s). In addition, does SURS own the data and retain full access to it?		
78	General	List the browsers and minimum versions your product supports and note if and how functionality is impaired on certain browsers.		
79	General	Does your product have a thick client? If so, describe its technical requirements and how it differs from web-based access your product offers.		

	Area	Question	Capability (0-4)	Comments
80	General	Describe your product's ability to support a multi-tenant structure with multiple support units having different product configuration needs.		
81	Identity Management	Active Directory Authentication Sync/SSO - this is a requirement for adequate security.		
82	Identity Management	Multi-Function Authentication for Power Accounts Tighter control for at least power users, if not all		
83	Identity Management	Workflows for permissions As people need permissions, or no longer need them, HR and FIN leaders need to approve/remove access rights		
84	Identity Management	Role-based provisioning Adding person to group provides baseline access, based off of approvals from appropriate reseource		
85	Infrastructure - Cloud/SaaS Option	SOC reporting (or equivalent) System and Organization Controls Reporting - to support auditing requirements		
86	Infrastructure - Cloud/SaaS Option	US-based data location(s) To be consistent with our current cloud data practice		
87	Infrastructure - Cloud/SaaS Option	SLAs for Priority 1 & 2 (big outage & small outage) events Need some sort of gurantees of service/service credits		
88	Infrastructure - Cloud/SaaS Option	Demonstrable Disaster Recovery/Business Continuity plan Safeguard the environment		
89	Infrastructure - Cloud/SaaS Option	Controllable Upgrade Path SURS should have some input in the manner in which upgrades are pushed		
90	Infrastructure - On Premise Option	Ability to run on VMWare virtualized servers		
91	Interfaces and Integration	Describe how your product allows data to be displayed on disparate systems via an external data feed (i.e. RSS, XML, etc.).		
92	Interfaces and Integration	Describe how your workflow can integrate with third-party products / solutions.		
93	Interfaces and Integration	How does your product integrate with Identity and Access Management solutions (password management, user provisioning)?		
94	Interfaces and Integration	Does the use of integrations or custom APIs affect licensing or is the use of integrations/custom APIs limited in any way?		
95	Interfaces and Integration	Integration into BI Edge Data reporting/visualization tool		

	Area	Question	Capability (0-4)	Comments
96	Interfaces and Integration	Describe your API capabilities and how they are documented. How does your product provide integration, i.e. Solarwinds, Office 365, Active Directory, ManageEngine, WiseTrack w/barcode scanning, SIEM solutions, Pinnacle, Microsoft Exchange, Chat/IM, text Messaging/MMS. Provide a list of products and services that your product integrates with out of the box. Also confirm whether or not your product has open API/Web Services for custom integration.		
97	Knowledge Management	What import capabilities does your product have for Knowledge Management?		
98	Security and Compliance	How does your product support single sign-on and what methods are supported?		
99	Security and Compliance	PCI/HIPPA compliance Compliant with industry standard security practices		
100	Security and Compliance	Encrypted Data At motion and at rest		
101	Service and Support	Logging and reporting for administrative access events Either via dashboard and API into our SIEM…will need to keep logs for audit purposes - is this supported?		
102	Service and Support	Administrator/Power User Training - describe to what extent we would be able to operate independently with adequate power users of our own.		
103	Service and Support	Describe the support model for your product including methods of contacts and availability. Are there tiered support packages that allow us to choose our support level?		
104	User Environment	Do you provide a mobile app? For what platforms (include specific operating systems and versions)		
105	User Environment	Geo-fencing capability Ability to lock down access via IP or other capability		
106	User Environment	Support for Windows and Mac OS Desktop Platforms Within 2 recent versions		
107	User Environment	At least 1 other environment, and preferred 2 QA/Dev sandboxes to test new releases/functions/integration changes		
108	User Environment	Mobile Application Ability to deploy via AW or MSFT MDM		
109	User Environment	Integration into O365 Could work well for workflow and documentation processes…PowerBI for dynamic reporting/visualizations		